

technicians and individual Canadian companies. He expressed the view that each Japanese company has its own standards and that it would be difficult to establish broad Canadian standards which would satisfy these individual requirements. He is pleased with the existing product grading system and would set only the following minimum requirement - the elimination of immature and spawned roe.

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Kyoshoku is the largest producer of flavoured roe in Japan and operates a nationwide distribution network. The company purchases roe from four different packers in Atlantic Canada representing about 700 tonnes production in 1988. 100 tonnes were also purchased from Europe.

The company was optimistic about increased consumption of flavoured roe in Japan but expressed some concern about the capacity of stocks to sustain increased fishing pressure. If the Japanese processors are to expand distribution and end product forms they need to be assured of a stable raw material supply. Kyoshoku is typical of companies placing increased emphasis on developing new products to expose more consumers to flavoured roe. In this context a typical 10 kg of No. 3 grade roe was sorted and produced no less than eight products each filling a different market niche. This included five grades of whole roes for various ready to eat presentations as well as broken, pieces and sponge roes for prepared products including pickles and different cooked vegetable combinations. In addition a new product designed for the upscale gift pack market was produced: Kazanoko in saki mash. It was interesting to note that all the Atlantic roe has the potential of being utilized in some product form. However, while some upgrading to higher priced packs occurs, extensive downgrading also occurs with pencil, spongy and immature roes, thereby lowering the processors returns overall.

With respect to quality differences in Canadian roe, the company singled out the problem of excess spongy roe as a major concern. Marked variations were noted in the proportion of spongy roe between one packer and another but the causes were said to be difficult to